Quota_Create YTD Sick leave earned and taken

<div align="right">

PA30

</div>

Change History

Update the following table as necessary when this document is changed:

Date	Name	Change Description
9/12/2007	Kelly Welsh	Initial Draft
10/17/2007	Kelly Welsh	Edits from per SME review
11/13/2007	Kelly Welsh	Re-created, from hard copy as file disappeared.
11/14/2007	K. Welsh	Edits from SME

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Purpose

Use this procedure when an employee transfers into your agency from an agency that does not maintain leave balances within HRMS. You will need to create records to capture the Year to date (YTD) sick leave earned and taken for the employee.

Trigger

Perform this procedure to create the YTD Sick leave earned and taken.

Prerequisites

Employee transfers from an agency that does not maintain leave balances in HRMS into your agency and needs sick leave earned and taken balances created.

Transaction Code

PA30

Date	Procedure Update Log
11/13/2007	Created

Helpful Hints

Refer to the OLQR user procedure "Appointment Change Action – Transfer" for additional information regarding transfers.

The system may display three types of messages at various points in the process. The messages you see may differ from those shown on screen shots in this procedure. The types of messages and responses are shown below:

Message Type	Description
Error	**Example**: Make an entry in all required fields. **Action**: Fix the problem(s) and then click (Enter) to proceed.
Warning	**Example**: Record valid from xx/xx/xxxx to 12/31/9999 delimited at end. **Action**: If an action is required, perform the action. Otherwise, click (Enter) to proceed.
Confirmation	**Example**: Save your entries. **Action**: Perform the required action to proceed.

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Procedure

1.   Start the transaction using the transaction code PA30.

Maintain HR Master Data

2.   Complete the following fields:

Field Name	R/O/C	Description
Personnel no.	R	The employee's unique identifying number. **Example:** 1164003
From.	R	The employee's last day at the losing agency **Example:** 7/31/2007
To	R	The employee's last day at the losing agency **Example:** 7/31/2007

3   Click ![Enter] (Enter) to validate entries

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4. Click the [Time Recording] tab.

5. Click they grey box to the left [Absence Quotas] to select

6. Enter the last date the employee worked in the losing agency into the Period Selection

7. Click [ ] (Create) to create a new record.

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Create Absence Quotas (2006)

8. Complete the following fields:

Field Name	R/O/C	Description
Type	R	The specific absence quota, such as Sick Leave.
		Example: 90- Sick Leave Conversion

9. Click ⊡ (Matchcode) to open the selection list.

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Absence Quota Type (1)   16 Entries found

Absence Quota Type (2)   16 Entries found

Restrictions

ESG Time quota types: 1
PS grpg tm quota typ: 15

AQT...	Quota text	Start Date	End Date	TMU	Unit
30	Sick Leave	01/01/1900	12/31/9999	001	Hours
31	Annual Leave/Vacation	01/01/1900	12/31/9999	001	Hours
34	Jus. Excess Leave	01/01/1900	12/31/9999	001	Hours
35	Compensatory Time	01/01/1900	12/31/9999	001	Hours
37	Exchange Time	01/01/1900	12/31/9999	001	Hours
38	Military Leave	01/01/1900	12/31/9999	001	Hours
39	Holiday Credits	01/01/1900	12/31/9999	001	Hours
40	Excess Vacation Acrual	01/01/1900	12/31/9999	001	Hours
41	Shared Leave	01/01/1900	12/31/9999	001	Hours
42	Personal Holiday - Shift	01/01/1900	12/31/9999	010	Days
43	Settl Leave WSP	01/01/1900	12/31/9999	001	Hours
44	Recognition Lv (non-rep)	01/01/1900	12/31/9999	001	Hours
45	PH - Shared Lv. Donation	01/01/1900	12/31/9999	001	Hours
46	Sick Leave Pool	01/01/1900	12/31/9999	001	Hours
47	Uniformed Serv Lv Pool	01/01/1900	12/31/9999	001	Hours
90	Sick Leave Conversion	01/01/1900	12/31/9999	001	Hours

10.   Click `90      Sick Leave Conversion` .
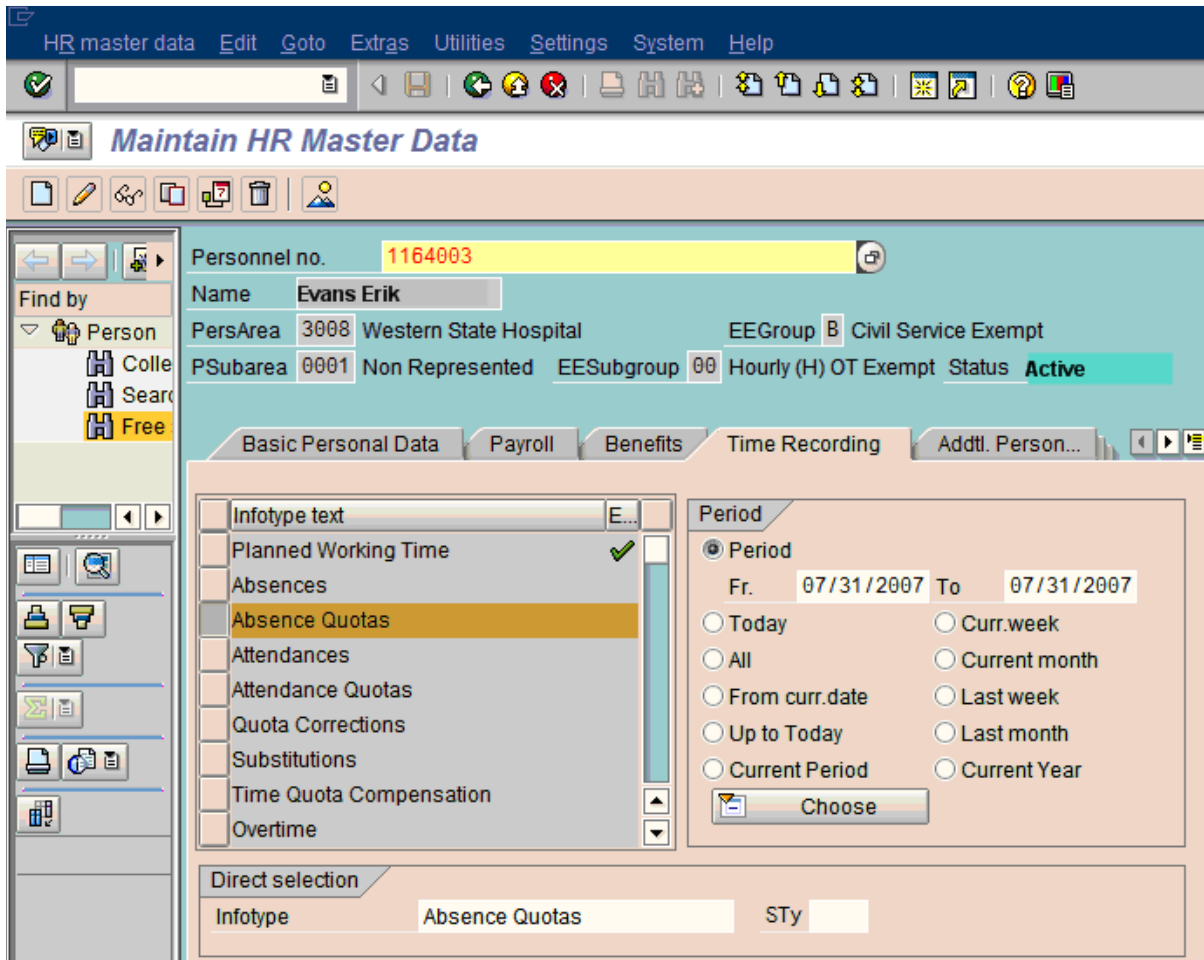
11.   Click ✔ (Copy) copy and continue.

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Create Absence Quotas

12. Complete the following fields:

Field Name	R/O/C	Description
Number	R	This is the Year to date total number of sick leave hours earned from the start of the year until the employees' last day with the losing agency. **Example:** 32
Valid From	R	The employees' last day at losing agency. **Example:** 7/31/2007
End Date	R	The employees' last day at the losing agency. **Example:** 7/31/2007
Deduction from	R	The employees' last day at the losing agency. **Example:** 7/31/2007
Deduction to	R	This is the date on which the deduction record should end, or cease being effective. **Example:** 12/31/9999

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13. Click ![Enter icon] (Enter) to validate entries.

14. Click ![Save icon] (Save) to save entries.

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15. Click the grey box to the left of ![Time Quota Compensation] to select.

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16. Click ▯ (Create) to create a new a record.

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Subtypes for infotype "Time Quota Compensation" (1)   14 Entries found

ESG	PSG	Comp.meth.	Description
2	10	1000	Free compensation
2	10	9001	Sick Leave Buyout - Tax
2	10	9002	Sick Leave Buyout -No Tax
2	10	9003	Annl Leave Buyout-Ret
2	10	9004	Annl Leave Buyout -No Ret
2	10	9005	Sick Leave Buyout-Annual
2	10	9006	Comp Time Buyout
2	10	9007	Sick Leave Buyout - VEBA
2	10	9008	Comp Time Buyout-No Ret
2	10	9009	Holiday Credit Buyout WSP
2	10	9010	Settl Lv Buyout WSP-NoRet
2	10	9011	Settl Lv Buyout WSP-Ret
2	10	9012	Hol. Cr. Buyout WSP-NoRet
2	10	9999	YTD Sick Lv Taken - Conv

17.   Double- Click 2   10   9999   YTD Sick Lv Taken - Conv .

18.   Click ✔ (Copy) to accept.

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Create Time Quota Compensation

19. Complete the following fields:

Field Name	R/O/C	Description
Start	R	This is the date on which a record begins. ❌ This field defaults to date of entry. **This date needs to be the same date that was used when creating the employee's Absence Quotas (2006). The last day the employee worked for the losing agency.** **Example:** 7/31/2007

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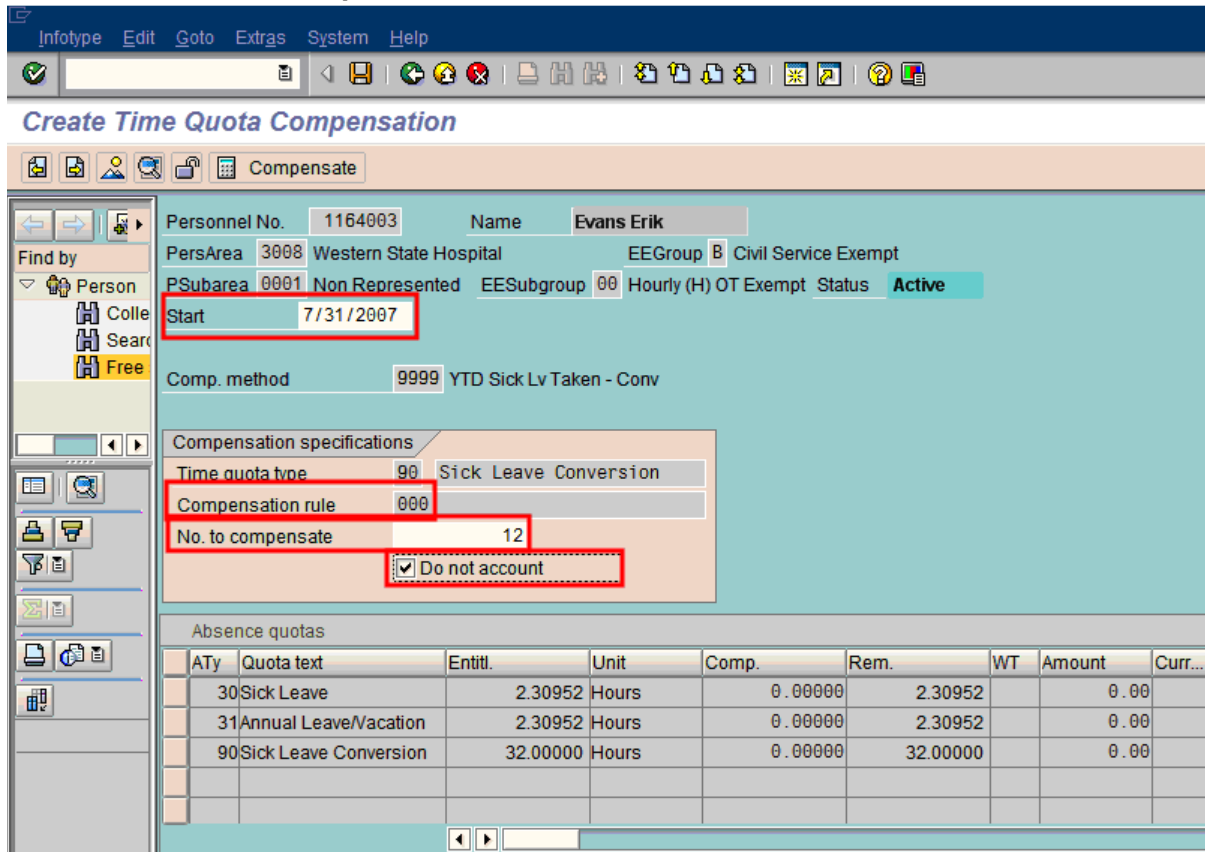| Field Name	R/O/C	Description
No. to compensate	R	This allows the user to enter the number of hours or days a quota type to be paid out to an employee. Enter the employees YTD sick leave taken up to the transfer in this field. **Example: 12**

Compensation rule should automatically populate, if not enter 000.

20.   Click ☑ Do not account   . If this field is left unchecked, the amount will be paid out to the employee.

Create Time Quota Compensation

21.   Click ⊘ (Enter) to validate entries.

22. Click ![Save icon] (Save) to save.

![Information icon]   The system displays the message, "Record Created."

23. You have completed this transaction.

Result

You have created YTD Sick leave earned and taken balances

Comments

The Absence Quotas section will generate it self from the initially created Absence Quota (2006) Infotype.

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